

DIVISION FOR WORKFORCE SERVICES

REPORT SPECIFICATION

REPORT TITLE: **CASE MANAGER COUNT REPORT**

OBJECTIVE: Lists all participants served by a specific case manager for a specific time frame.

PURPOSE:

To show the total number of customers a specific case manager served by specific funding stream.

PARAMETERS:

Case managers last and first name, beginning date, ending date, and WIB name

SPECIAL CRITERIA:

It lists the WIA Customers who have received services within the specific time period specified by the Begin and End date parameters and the service must have been provided by the staff specified by the CASE MANAGER parameter also the service must have been provided by the office which is under the WIB specified by the user.

To get the list of services done by a staff (case manager), enter the last name, first name of the staff and if you want the services done by the staff for a specific WIB or all WIBs then you can select either the specific WIB name or just enter ALL to obtain the list of services for all the WIB's. The report also lists the funding for each of the service given by the staff.

DIVISION FOR WORKFORCE SERVICES

REPORT SPECIFICATION

REPORT TITLE: **ACTIVE PARTICIPANT COUNT REPORT**

OBJECTIVE:

Shows aggregate numbers of active participants broken out by WIB, offices with WIB, programs and include a statewide rollout.

PURPOSE:

To show total number of adults dislocated workers, older youth and younger youth that were active during the data parameters by WIB and offices within the WIB.

PARAMETERS:

Will show all participants that have any activity during these dates. Pulls those that have a service start date(s) between the beginning and ending dates.

SPECIAL CRITERIA:

If in multiple funding with ADULT funds and other WIB funds the ADULT funding will always have priority and will be coded to the ADULT totals. Example: Adult/youth – will be adult

If in multiple funding with DISLOCATED Worker funds and Youth funds the DISLOCATED worker funds will always have priority and will be coded to the DISLOCATED worker totals.

This will allow for the participant to only be counted once for this report. This report also includes a summary of the number of participants who are being served with multiple funding.

At this time this report cannot be ran for only one WIB. Used for the KWIB report (Julia)

(If the beginning date (7/1/02) is equal to or greater than the actual service start date and the actual service start date is less or equal to the end date.

To obtain the list of all active WIA customers, who have not yet terminated or have the WIA termination date is greater than or equal to the BEGIN DATE parameter and have there WIA registration date less than the END DATE parameter and are older or of age 14 and who have received services between the DATE parameters or who still have there services active within the time period. The report gives the count of the Adults, DW, and Youth participants and also gives the count of customers who have multiple funding sources. So to enter the above information for a specific time period, just enter the beginning and ending dates in format MM/DD/YYYY.

DIVISION FOR WORKFORCE SERVICES

REPORT SPECIFICATION

REPORT TITLE: **TRAINING ACTIVITY REPORT**

OBJECTIVE:

Shows aggregate numbers of active participants broken out by WIB, offices with WIB, programs

PURPOSE:

To show total number of adults dislocated workers, older youth and younger youth that were enrolled in training activities ring the data parameters by WIB.

PARAMETERS:

Will show all participants that have any activity during these dates. Pulls those that have a service start date(s) between the beginning and ending dates.

SPECIAL CRITERIA:

Other Training includes the following services; customized training, combined workplace learning/related instruction, academic learning, English as second language (not Using), entrepreneurial training, On the Job training (OJT), skills upgrading and retraining, private sector training, workplace training, and work related/job readiness training.

Occupation skills include all ITA's and other training not captured above.

This report counts the WIA customers who have their WIA termination and Registration dates within the date parameters or who are active within that time period and who are of age 14 or greater at the time of registration. The customers on the report must have received services within the Begin and End date parameters or who have their service active within that time period. The report gives the count of the Occupational or Other training participants.

DIVISION FOR WORKFORCE SERVICES

REPORT SPECIFICATION

REPORT TITLE: PARTICIPANT HISTORICAL SUMMARY REPORT

OBJECTIVE:

Lists all participant services, dates of enrollment, completion, termination, termination reasons, employed in 1st or 3rd quarter, credential, funding source and case manager. This information is broken out by WIB, offices with WIB, funding.

PURPOSE:

To show total number of adults dislocated workers, older youth and younger youth that were active during the date parameters by WIB and office within the WIB. Also, includes a report summary listing number entered employment, number retained, and number of credential in the 1st quarter.

PARAMETERS:

Beginning and ending dates, Office, WIB and funding source.

This report gives the list of WIA customers, whose WIA termination and registration dates are within the date parameters or who are active within these parameters and have received services (irrespective of the dates). In addition the customer must have received services from the office and WIB specified in these parameters (Office/WIB parameter) and funded by the funds selected in the fund parameter.

SPECIAL CRITERIA:

This reports may be rather large depending on the dates that are used for the report.

DIVISION FOR WORKFORCE SERVICES

REPORT SPECIFICATION

REPORT TITLE: **NATIONAL EMERGENCY GRANT**

OBJECTIVE:

Lists all participant services, dates of WIA registration, enrollment, completion, termination, termination reason, employed in 1st quarter, six months retention and credential. The information is broken out by WIB, offices within WIB, programs.

PURPOSE:

To show total number of participants that are being provided services paid with NEG funds.

PARAMETERS:

Beginning and ending dates. Will show all participants that have any activity during these dates.

FUNDING: Select the appropriate NEG fund from the drop down listing.

SPECIAL CRITERIA:

This report has 5 parameters as mentioned above. The reports pulls WIA customers who are active, i.e who have not yet terminated and or have their registration and termination dates within the specific time period, specified by the Begin and End date parameters. This report is broken down by WIB and office so there is an option of selecting data for a specific office or WIB by the drop down parameter box or for ALL offices and WIB, which can be done by selecting ALL for the office parameter and ALL for the WIB. The report is also broken down by fund so the user can select either of the funding parameter from the drop down box, so the report will list only those users who have the selected NEG funding.

If a user wants a report with the list of customers who have been active in the time period 06/01/2004 – 06/30/2004 and have received NEG services (irrespective of the service dates) and for the office KY0053 and WIB Green River and for the fund DTR Statewide NEG then the user will do as follows:

Begin Date: 06/01/2004

End Date: 06/30/2004

Office: KY0053

WIB: Green River (Selected from the drop down box)

Fund: DTR Statewide NEG (Selected from the drop down box)

DIVISION FOR WORKFORCE SERVICES

REPORT SPECIFICATION

REPORT TITLE: **ITA PROVIDER ENROLLMENT REPORT**

OBJECTIVE:

Lists information on ITA provider or can be ran for a specific provider

PURPOSE:

Will show provider name, service name and offering. Also, includes participant data.

PARAMETERS:

Beginning and ending dates, provider name, WIB and Service Type.

This report has 5 parameters. The report pulls customers who are over the of age 14 and who are active within the time period specified by the Begin and End date parameters and should have the WIA service type code that is selected from the drop down box by the user. The customers shown in the report should also have the service dates between the Begin and End date parameters i.e. the service Cancel date must be null and the Actual End Date of the service should be null or it should be less than the Actual Start Date of the service or the Actual End Date of the service must be less than the Begin Date parameter, and the Actual Start Date of the service must be less than or equal to the End Date Parameter .The services selected based on the dates must have been provided by the Provider selected by the user from the drop down box from the Provider parameter and the services provided must have been from the Office and WIB selected by the User from the Office and WIB parameters . The report also displays the type of funding for the service provided.

SPECIAL CRITERIA:

If want the entire adult and dislocated worker ITA providers you would only need to enter the **WIB**, and in the provider parameter you would use ALL and enter the appropriate dates.

If you wish to run for youth or specific provider (ITAs included) you would need to include the WIB, dates and the name of the specific provider.

CRYSTAL REPORTING SYSTEM INSTRUCTIONS

To access the Crystal Reporting system for the local areas, enter the following address:

<https://reports.workforce.ky.gov>

If you need assistance, please contact Judy Dean 502/564-5360 or the Help Desk at
502/564-9216 or at 866/520-0002

Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites Media Print Copy Paste

Address http://wfdotscrw/crystal/enterprise9/ePortfolio/en/logonform.csp?action=logoff Go Links

ePortfolio

Cancel Help

Log On

Existing User

APS Name:

User Name:

Password:

Authentication:

powered by crystal

Done Local intranet

Start Inbox - Microsoft Outlook ePortfolio - Logon - Mi... 11:40 AM

Enter your Assigned User Name in the User Name Field

Enter your Password in the Password Field. (NOTE: If you are logging on for the first time you will need to use the Default password given to you.)

New Password - ePortfolio - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites Media Print

Address <http://wfdotscrw/crystal/enterprise9/ePortfolio/en/newpwdform.csp> Go Links >>

ePortfolio ? Help

Expired Password

New Account Information

User Name:

Old Password:

New Password:

Confirm New Password:

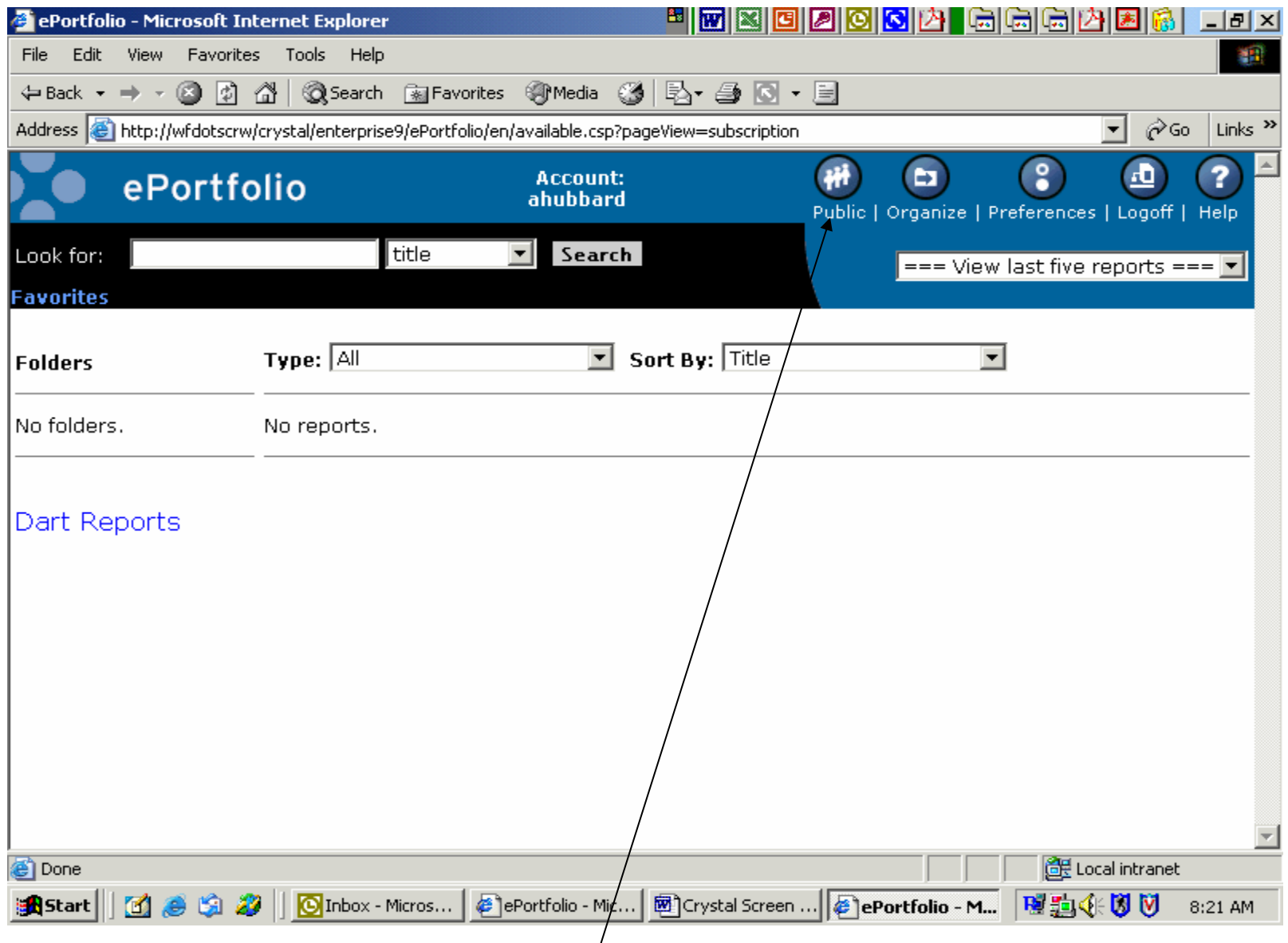
Password Expired

- Your account password has expired.
- Please update your password now.

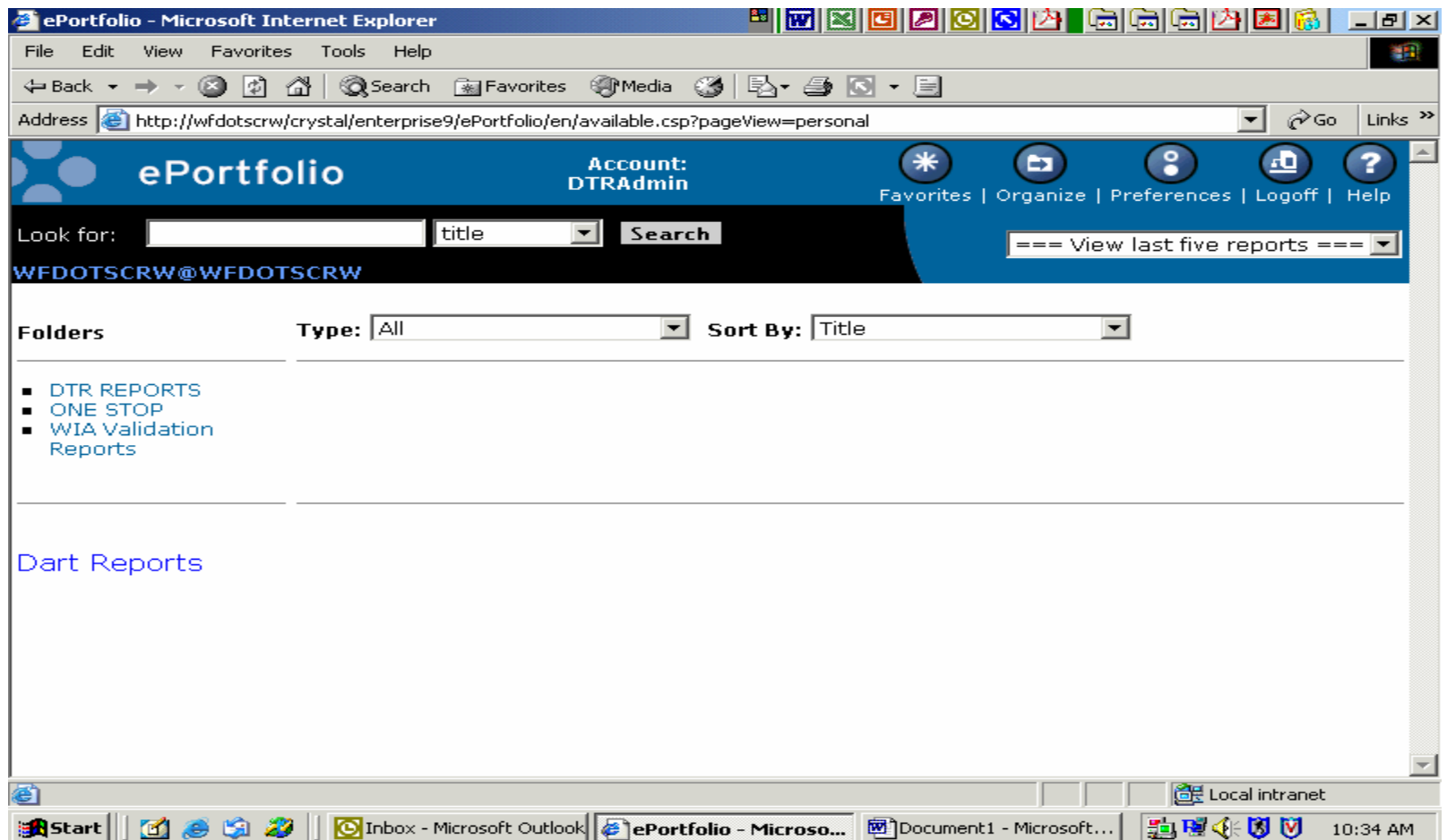
Done Local intranet 7:52 AM

Start | Inbox - Microsoft Outlook | New Password - ePortf...

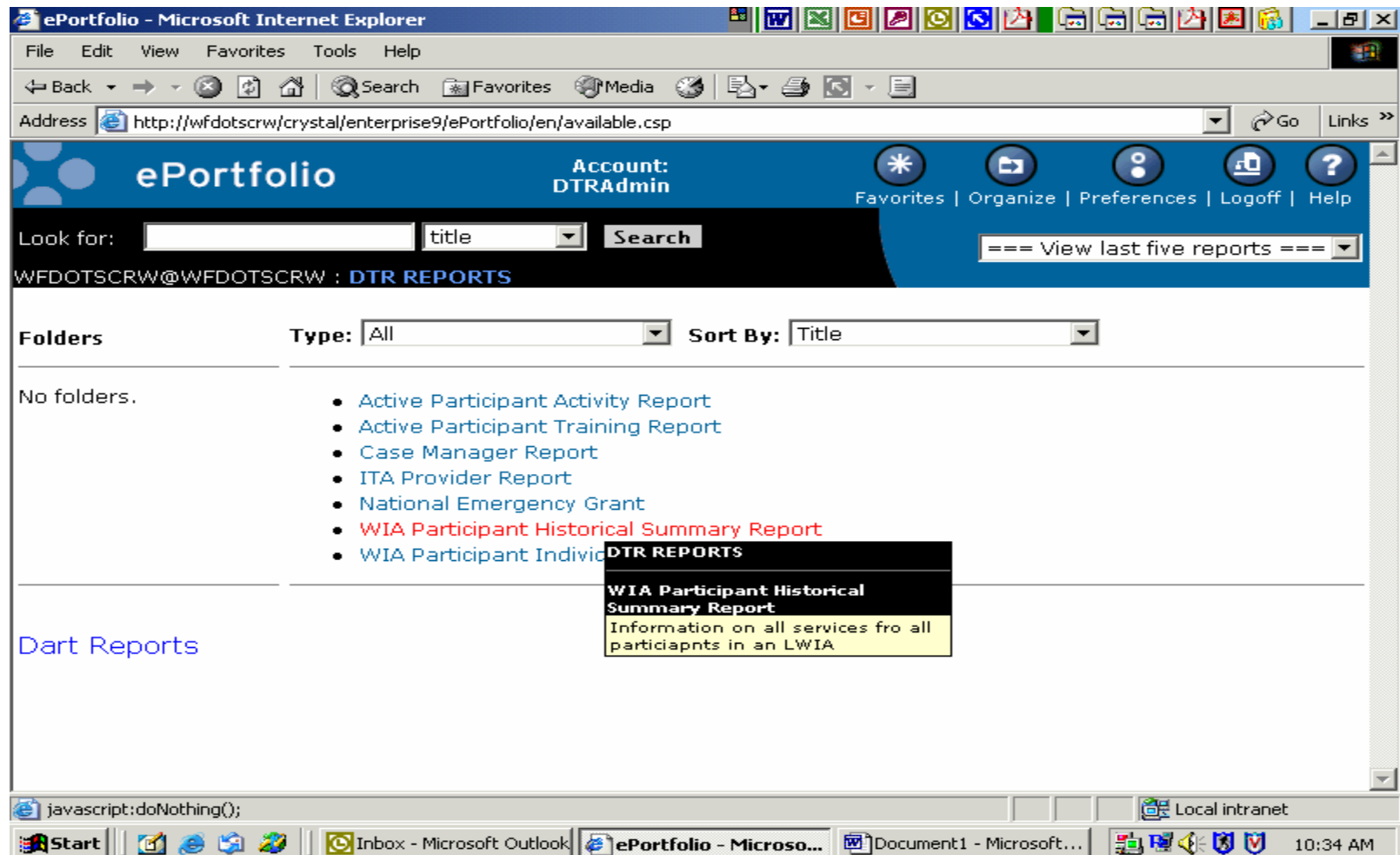
You will receive the message that your Default Password has expired. Re-enter the default in the Old Password field, enter new password in the New Password field, re-enter new password in the Confirm New password field and click on submit.



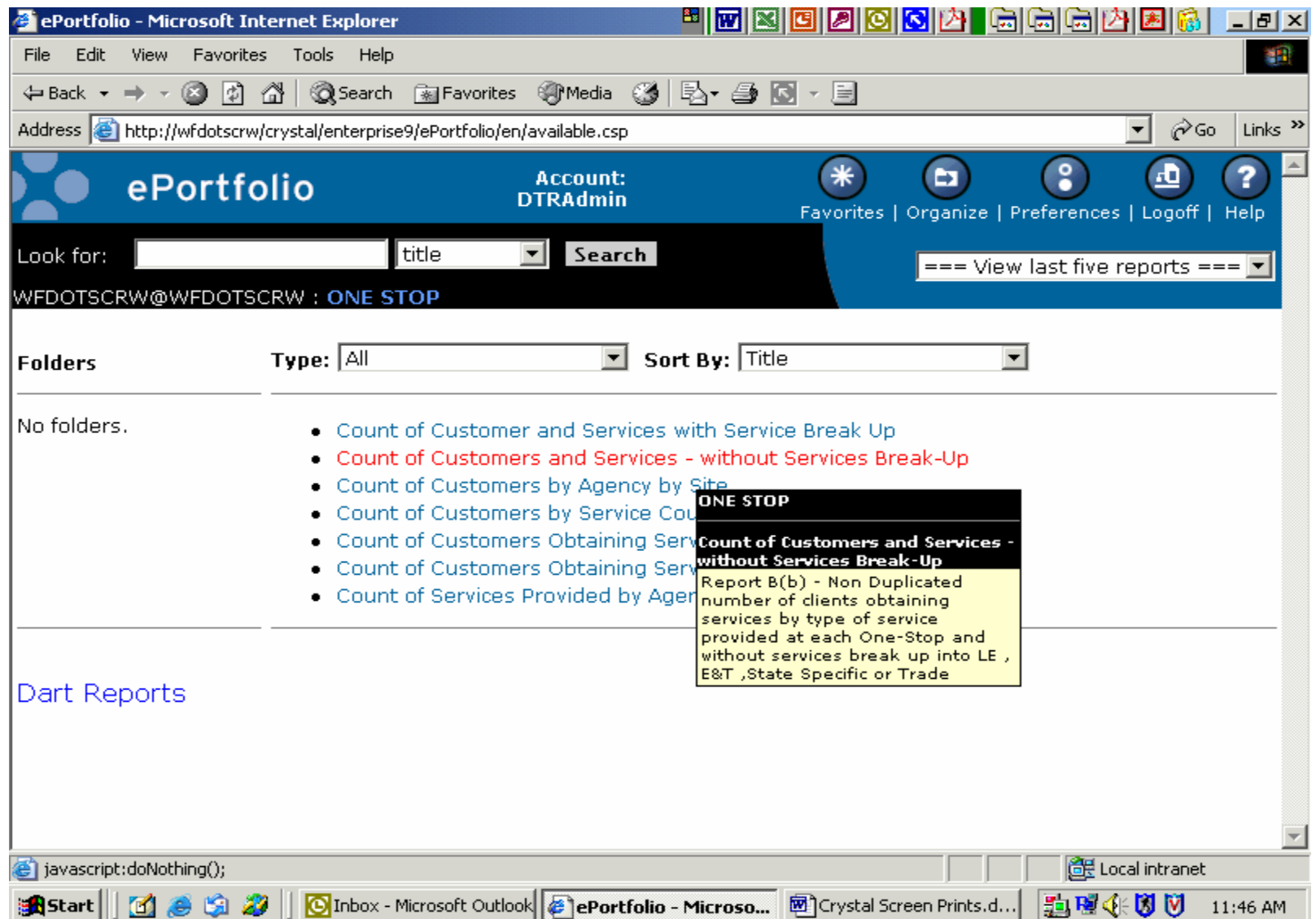
Click on the PUBLIC button on the top of the screen.



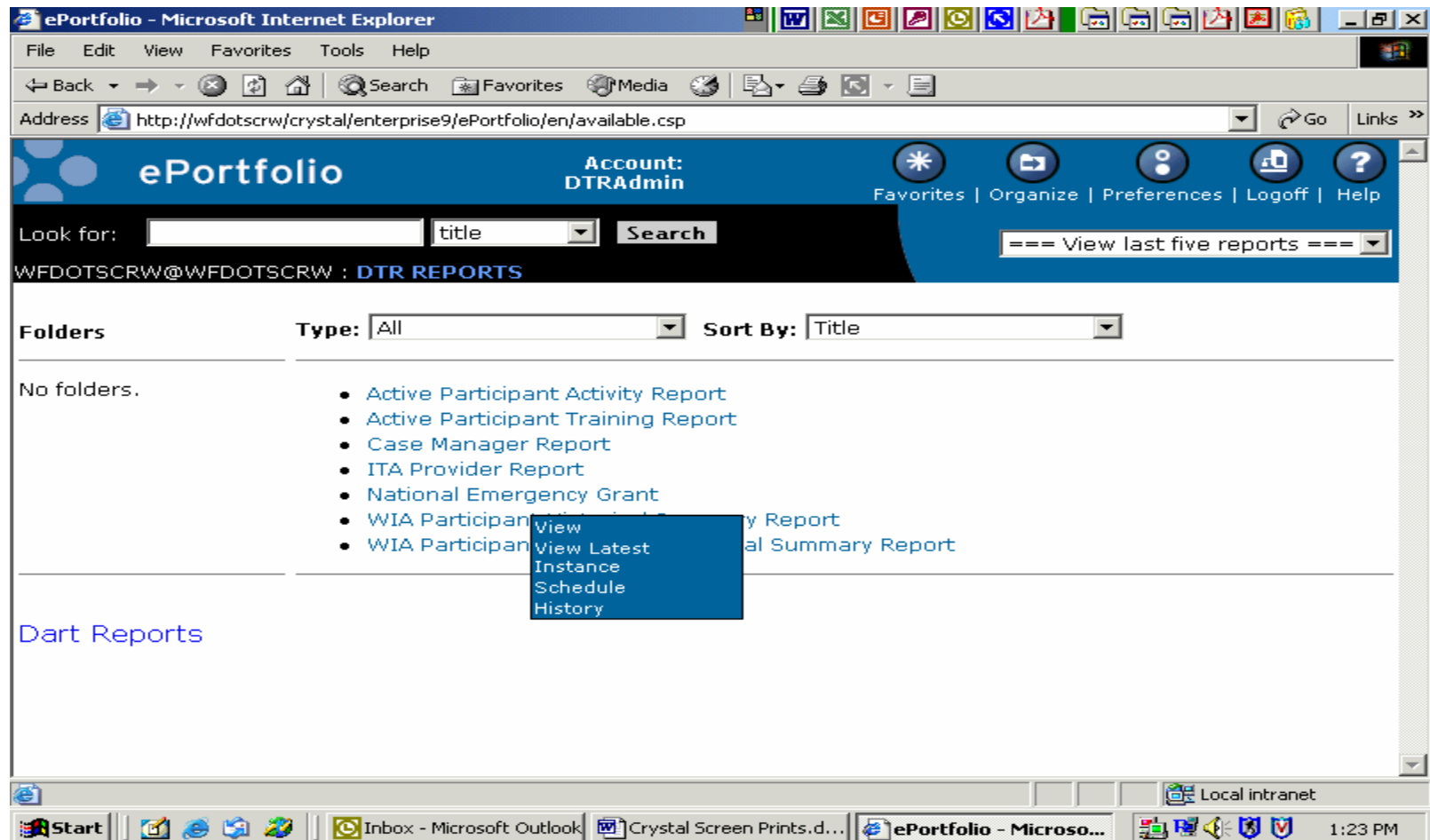
Click on DTR REPORTS or ONE STOP to see a listing of all reports available. For a description of each report, place your mouse on the report you would like and a short description will appear for that report.



Listing of DTR Reports

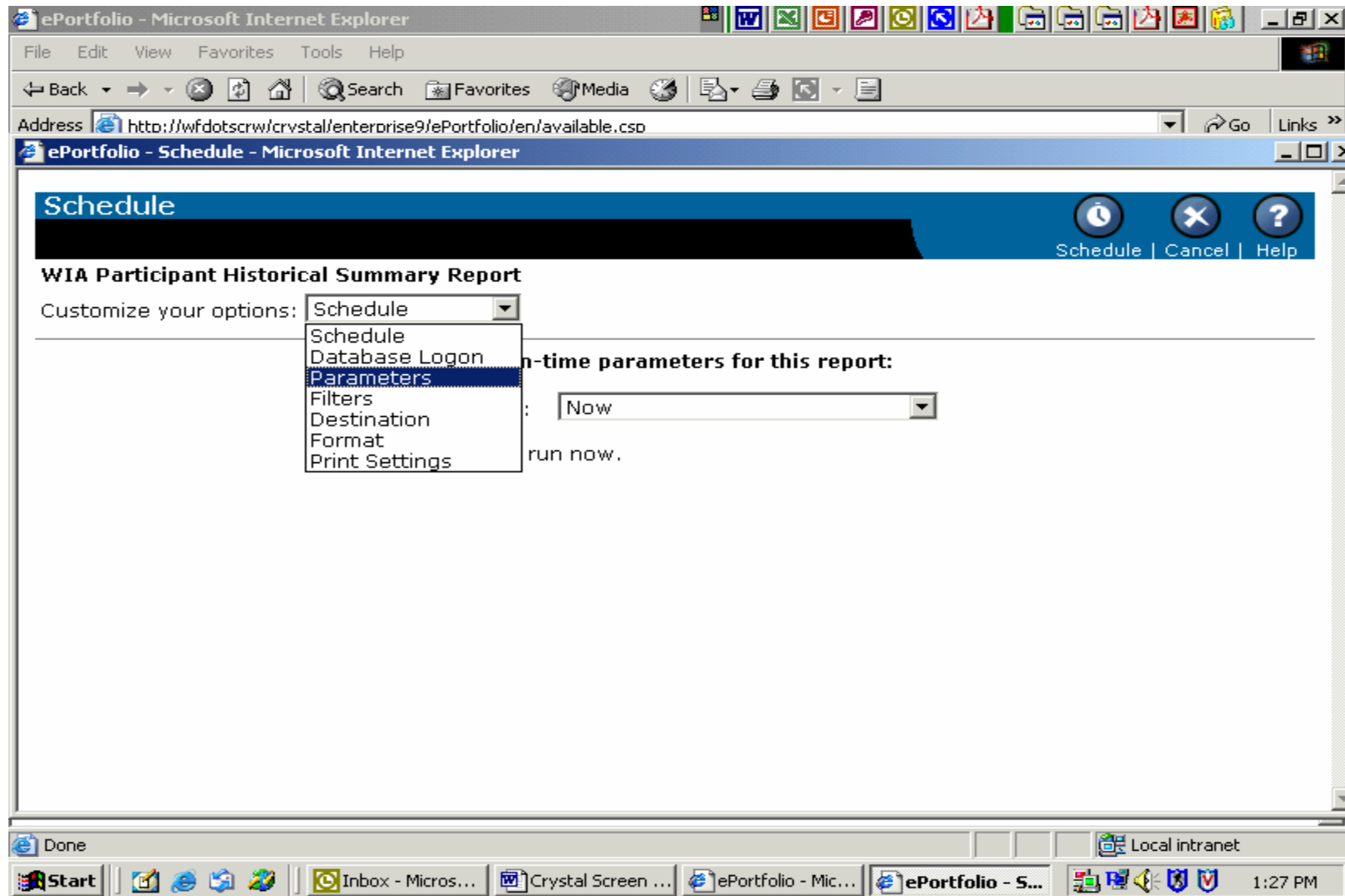


Listing of One Stop Reports



Once you have selected a report, double click on the name and a new screen will appear. Click on the “Schedule” to run the report.

“View History” will take you to the last report generated. “History” will take you to a listing of all reports generated. If you only have view you will not be allowed to Schedule.



To generate a report, click on the arrow in the Customize your options field. Click on the “Parameters” field.

Schedule

WIA Participant Historical Summary Report

Customize your options: Parameters

BEGIN_DATE: Enter Begin Date in format mm/dd/yyyy

New value: Add

Current value: 01/10/2002

☐ Set to null.

Enter the beginning date of your report. Dates must be entered as 00/00/0000

Click ADD

END_DATE: Enter End Date in format mm/dd/yyyy

New value: Add

Current value: 10/01/2002

☐ Set to null.

Enter the ending date of your report. Dates must be entered as 00/00/0000

Click ADD

OFFICE_IN: Select the Office Id

New value: ALL Add

Current value: ALL

To run for all offices within your area use ALL - Click ADD

To run for a specific office, click on the Arrow and scroll down to find the office, highlight. Click ADD

ePortfolio - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites Media Print Link

Address http://wfdotscrw/crystal/enterprise9/ePortfolio/en/available.csp Go Links

ePortfolio - Schedule - Microsoft Internet Explorer

Current Value: 04/21/2004

☐ Set to null.

OFFICE_IN: Select the Office Id

New value: ALL Add

Current value: ALL

☐ Set to null.

See attached listing of Valid Local Area Offices.

WIB_IN: Select the WIB

New value: ALL

Current value: DTR Statewide

☐ Set to null.

Click on the Arrow and scroll down to find your local area highlight.

Click ADD

FUND_IN: Select the Fund

New value: ALL

Current value: WIA Adult Local

☐ Set to null.

Click on the Arrow and highlight the funding source for the report. .

Click ADD

Done Local intranet

Start | Inbox - Micros... | ePortfolio - Mi... | Document1 - ... | ePortfolio - ... | 10:38 AM

Schedule

National Emergency Grant

Customize your options: Parameters

BEGIN_DATE: Enter Begin Date in format mm/dd/yyyy

New value: Add

Current value: **07/01/2003**

☐ Set to null.

END_DATE: Enter End Date in format mm/dd/yyyy

New value: Add

Current value: **04/20/2004**

☐ Set to null.

OFFICE_IN: Select the Office ID eg: KY0000 or ALL

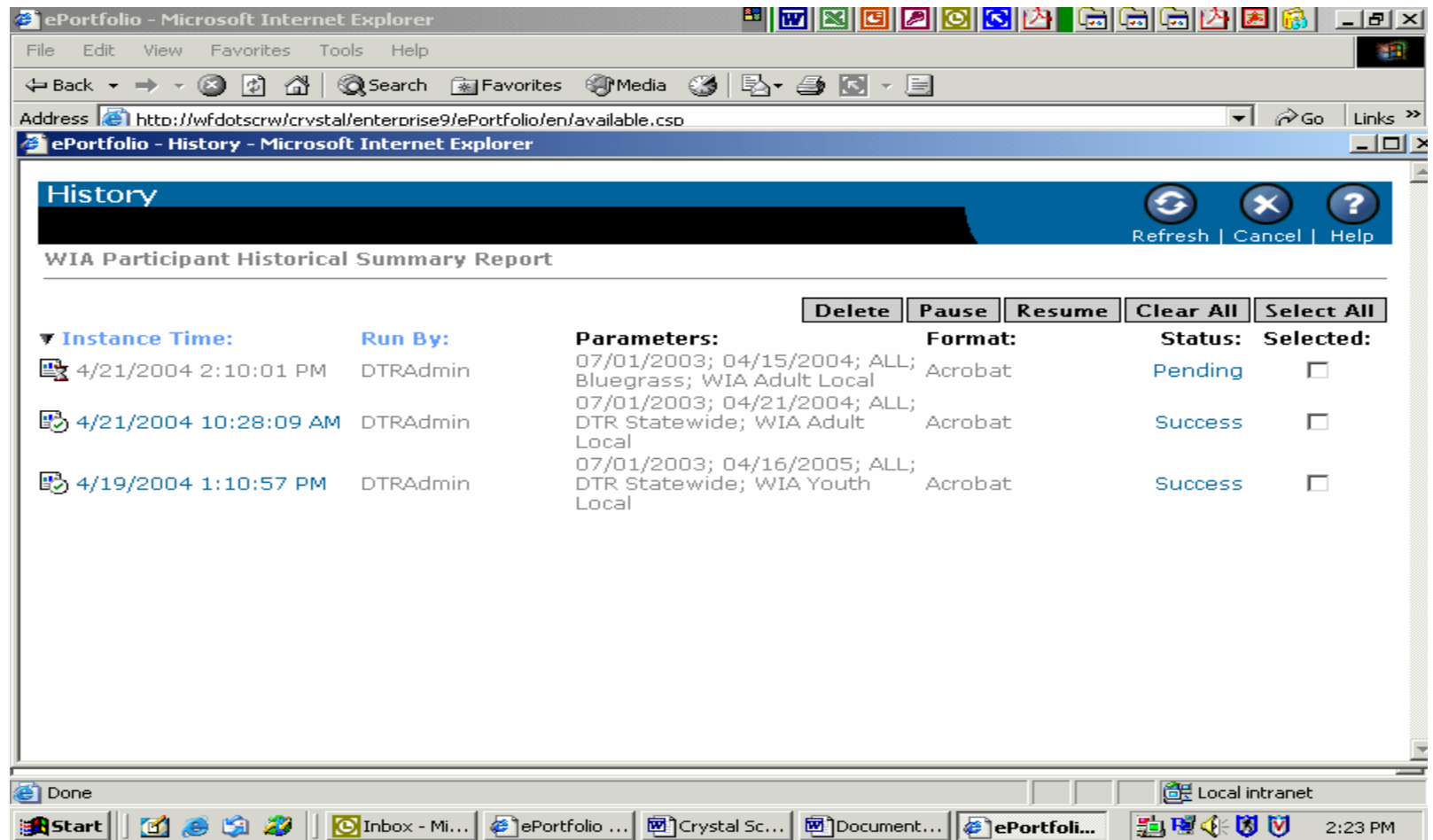
New value: ALL Add

Current value: **ALL**

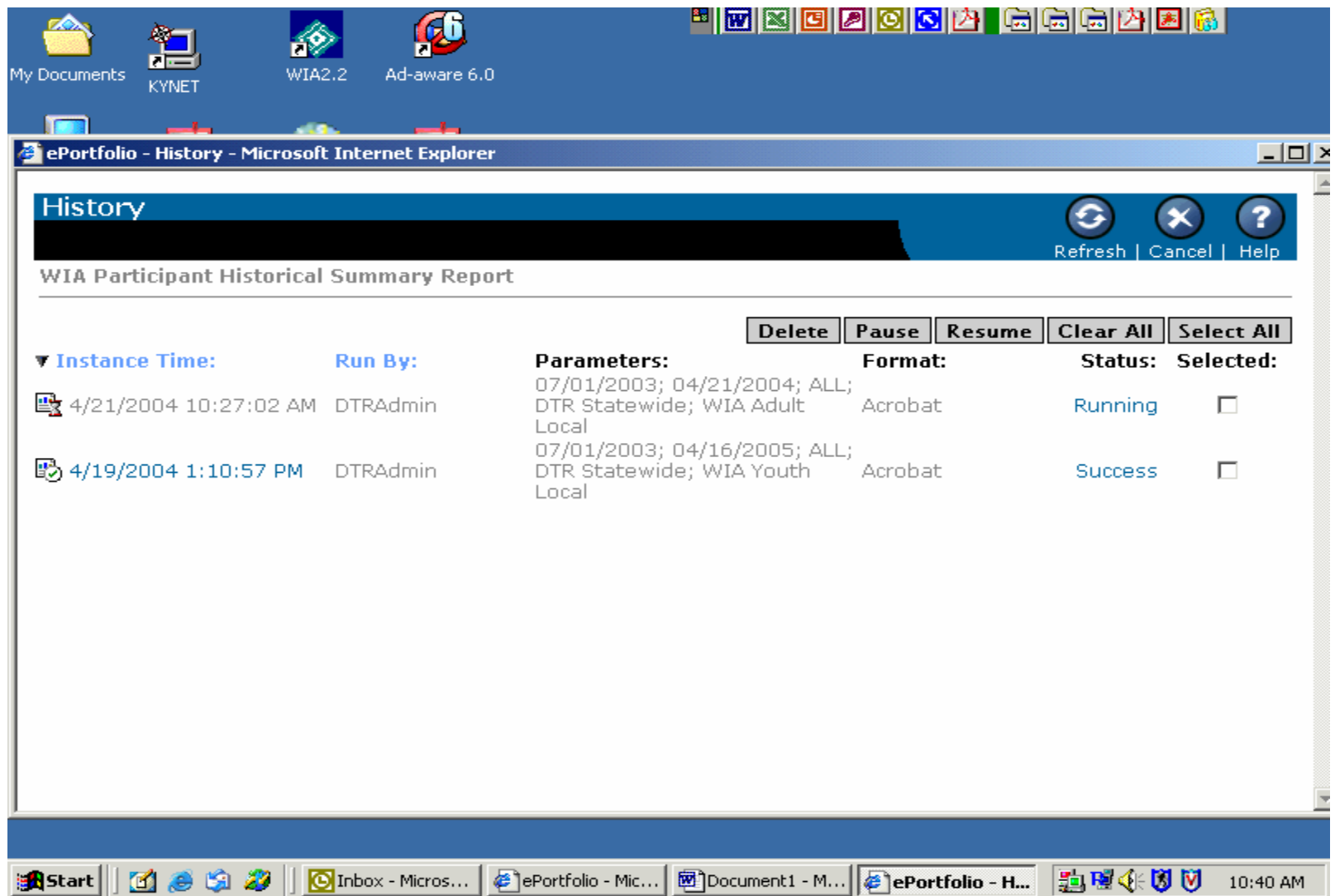
☐ Set to null.

Once you have added all of the parameters and they are correct, scroll back to the top of the screen and click on the **SCHEDULE BUTTON**.

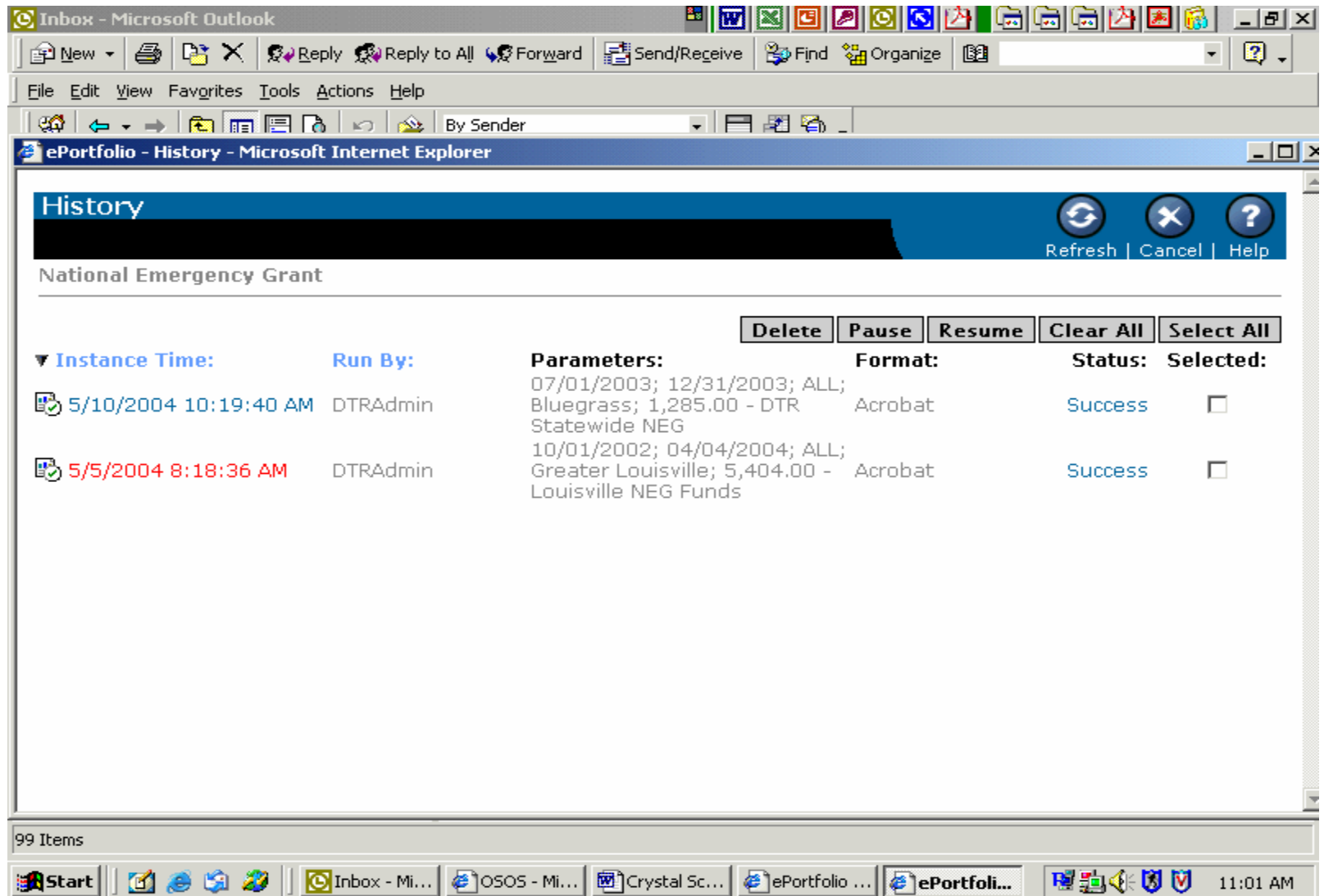
NOTE: YOU SHOULD REQUEST ONE REPORT AT A TIME AND LET IT FINISH RUNNING PRIOR TO REQUESTING ANOTHER REPORT.



Prior to running the report, review all of the parameters, if the information is incorrect, click on the Cancel Button and return to the Schedule Screen. If the report parameters are correct, Click on the REFRESH BUTTON to start the report, the status will change from Pending to Running.



Click on the Refresh button again and if the report is finished, it will change running to Success.



To access the report, double click on the information under the “INSTANCE TIME”. This line will change from blue to red.

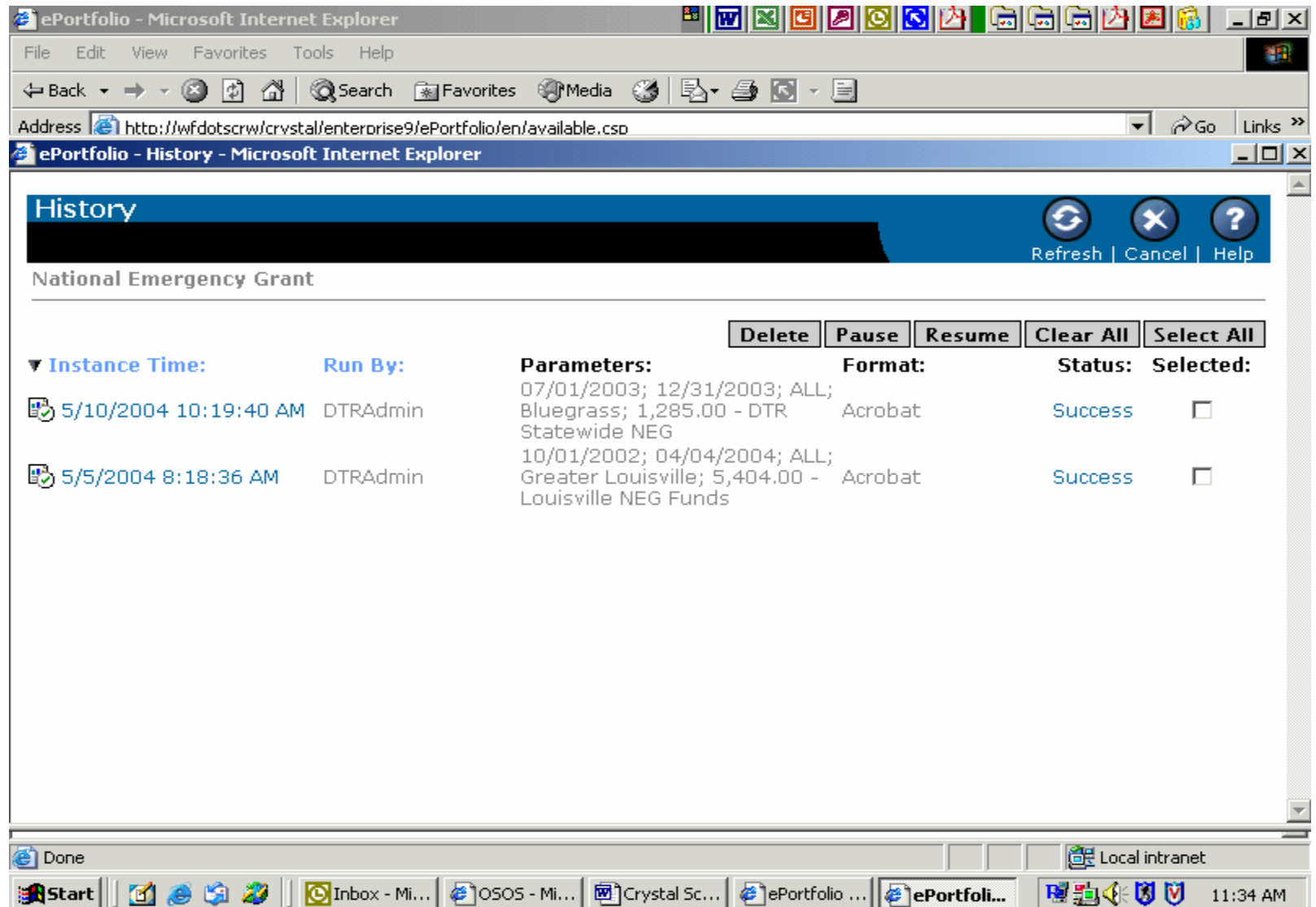
http://wfdotscrw/crystal/enterprise9/ePortfolio/en/objectviewer.cs

Cabinet for Workforce Development
Department of Training and ReEmployment
National Emergency Grant Report
From 07/01/2003 To 12/31/2003

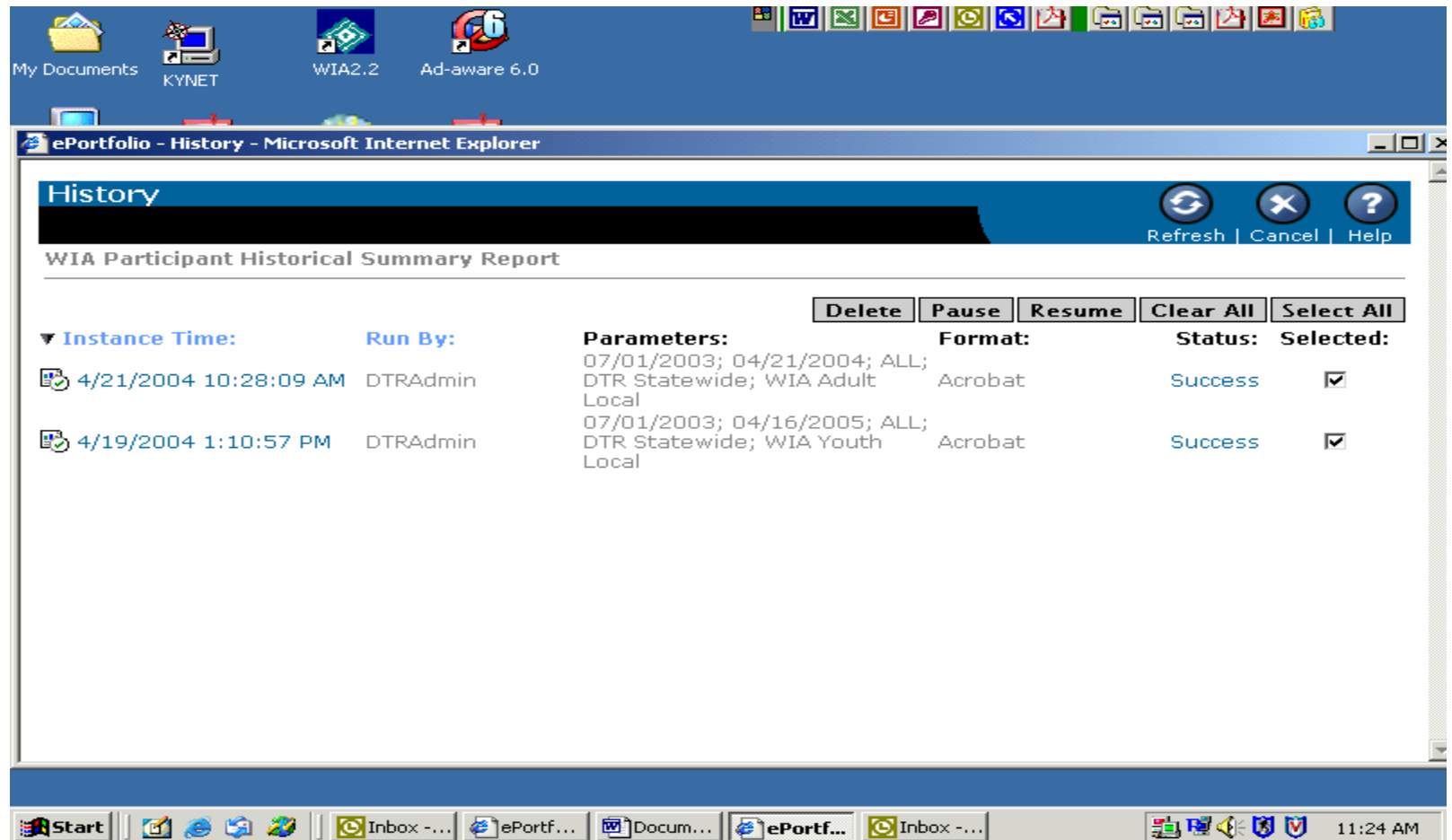
SSN	Registration Date	Termination Date	Termination Reason	Entered Employment 1st Ctr	Six Month Retention	Gained Credential	Service	Start Date	End Date	Funding Source
LWIA : Bluegrass										
OFFICE NAME : Bluegrass ADD										
NAME: BALLARD, VERNA	183467003	5/2/02	Not Yet Terminated	N/A	N/A	N/A				
							Case Management	5/2/02		DTR Statewide NEG
NAME: RATLIFF, MARILYN	236137436	7/10/03	Not Yet Terminated	N/A	N/A	N/A				
							Case Management	7/10/03		DTR Statewide NEG
							Occupational Skills Training	8/4/03	9/19/03	DTR Statewide NEG
NAME: DOAN, CLAYTON	271727062	5/6/02	Not Yet Terminated	N/A	N/A	N/A				
							Assessment Interview, Initial Assessment	5/9/02	5/17/02	DTR Statewide NEG
1										
Run Date : 5/10/2004 10:18:53AM										

Start | Inbox - ... | OSOS - ... | Crystal... | ePortf... | ePortf... | http:/... | 11:06 AM

To save a copy of the report, click on Disk Icon button on the left top line. Click on Printer Icon to print. To search for specific information in the report, click on the binocular.

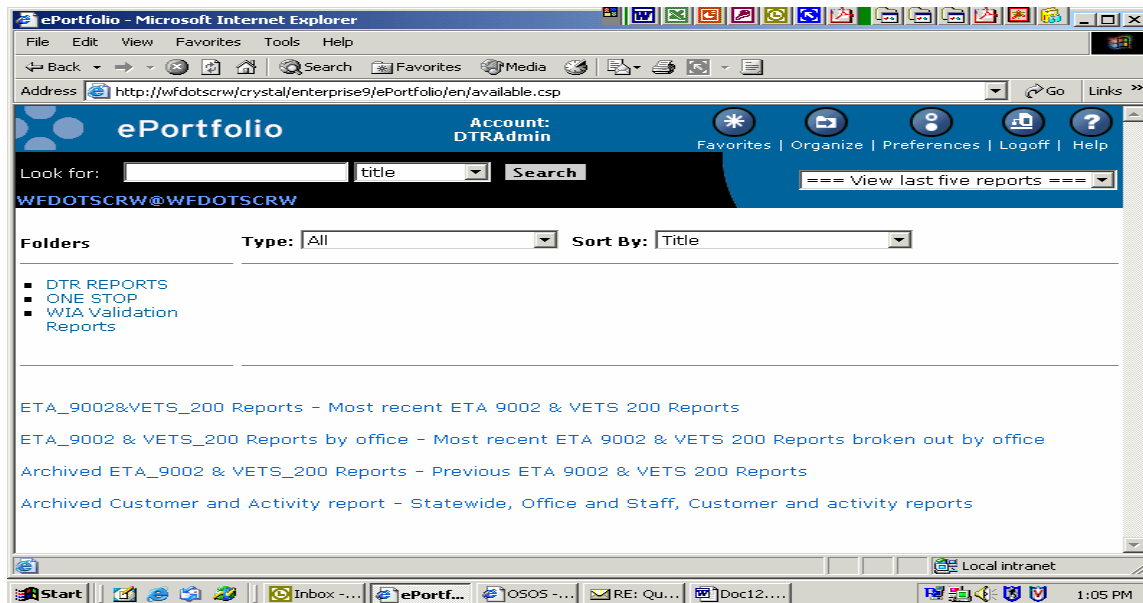


To return to the Reports screen, you can minimize this screen or you can close this section.



To delete a specific report, click in the box under Selected then click on DELETE. To delete all reports click the Select All Button, click the Delete button.

Kentucky Workforce Investment Act Customer Data Reporting Manual



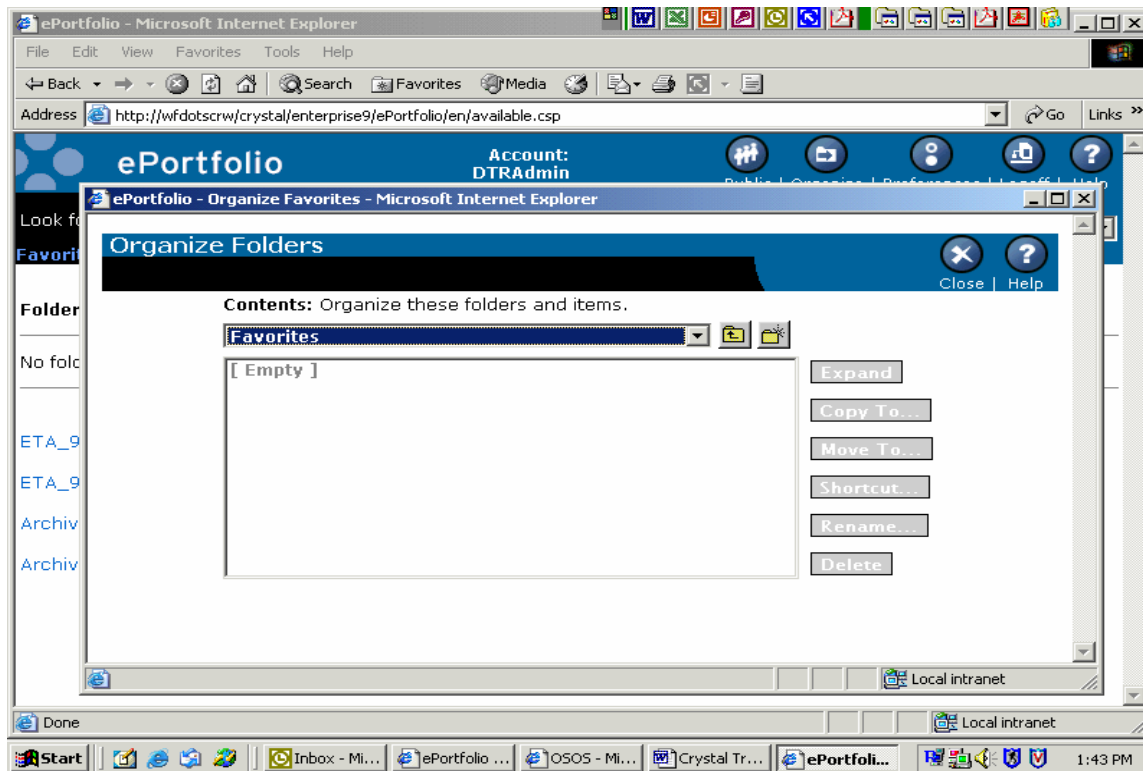
Favorites: If you have certain reports that you want to use you can move those reports to the favorites folder and set the View option under preferences to Favorites. By doing this when you log on to crystal go to you favorites folder and run the reports from there. This option helps the user to better organize the reports as per their preference.

Organize: Is use to helps you move reports to different folders.

Preferences: In the preferences section, you can choose a variety of options, like the color for eportfolio; view of the eportfolio and to change your password.

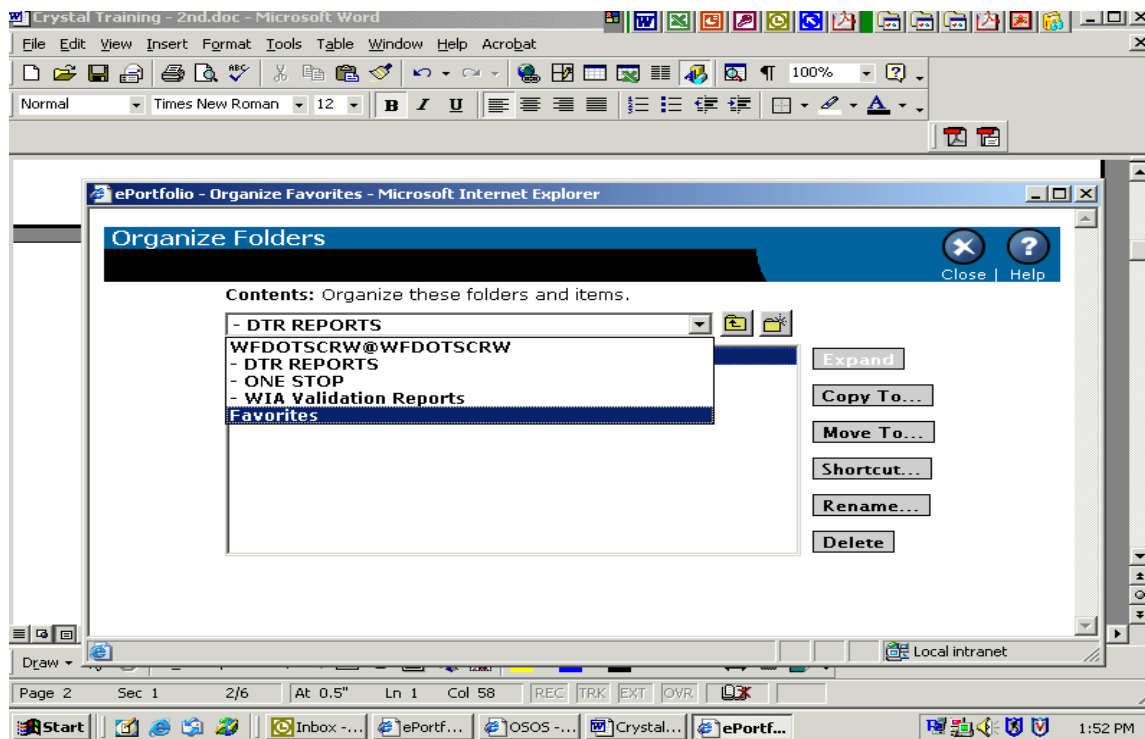
Instructions for creating a Favorites Folder - Click on the Favorites Button then click on the Organize Button and new screen will appear.

Kentucky Workforce Investment Act Customer Data Reporting Manual



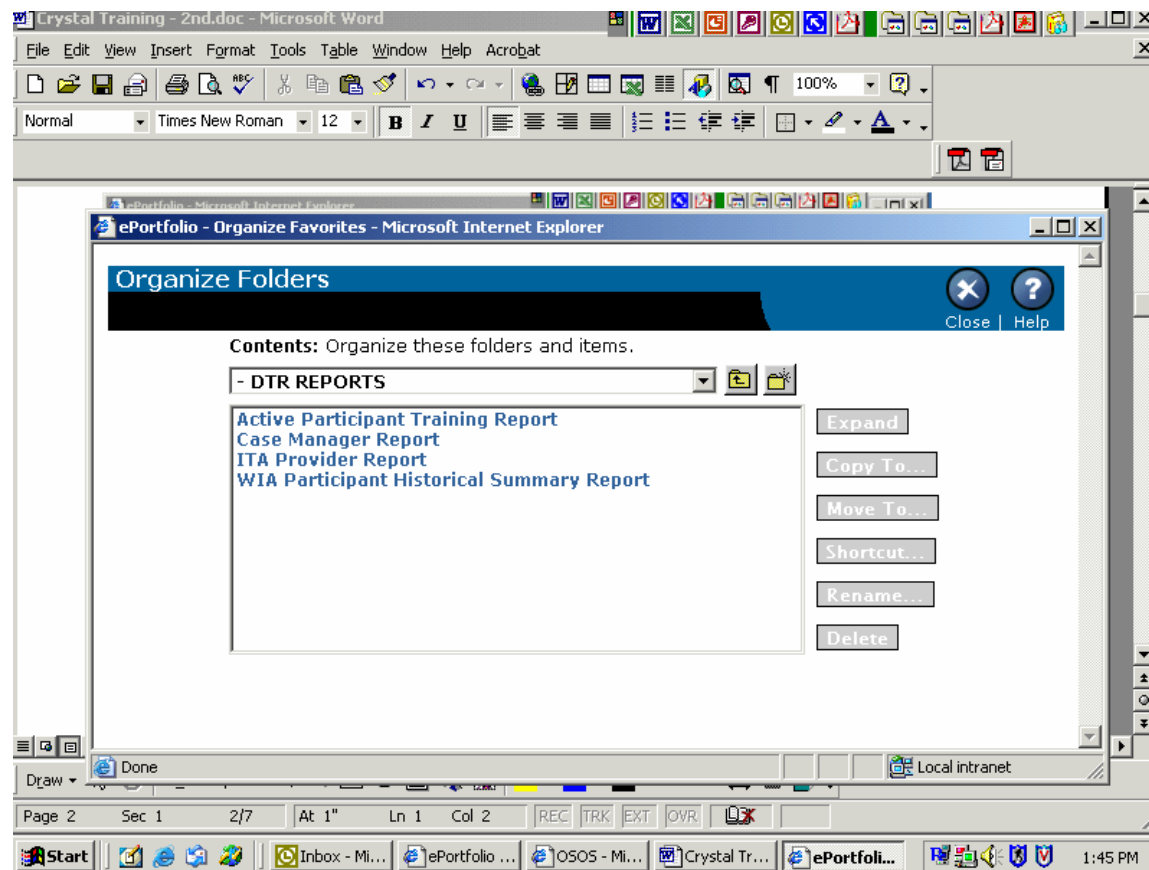
Click on the down arrow and select which set of reports you want

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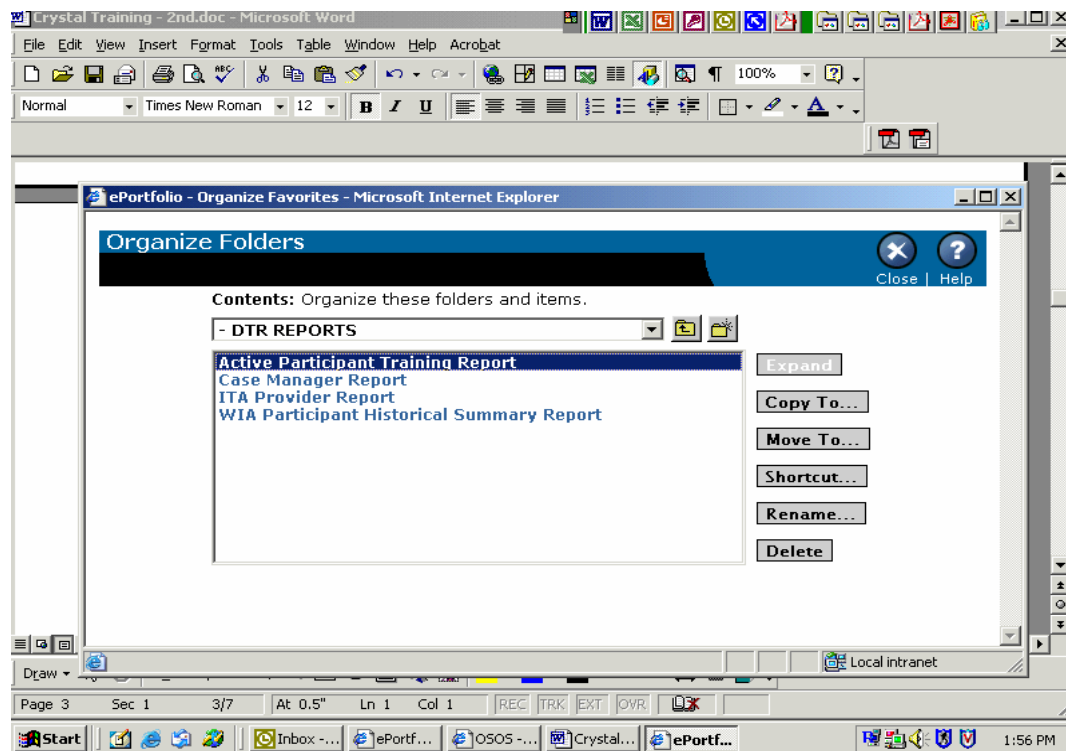
The listing of reports for that group will appear. Click on the report(s) you want to add to your new favorites folder. You can hold the shift key to select multiples.

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Once you have identified your reports click on the **MOVE TO** Button and then click on the **Close** button on the top of the screen.

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Copy To Button – Makes a similar copy of the reports to another folder the user selects.

Shortcut Button – Will create a short cut for the report selected.

Rename Button – Only for Administrators

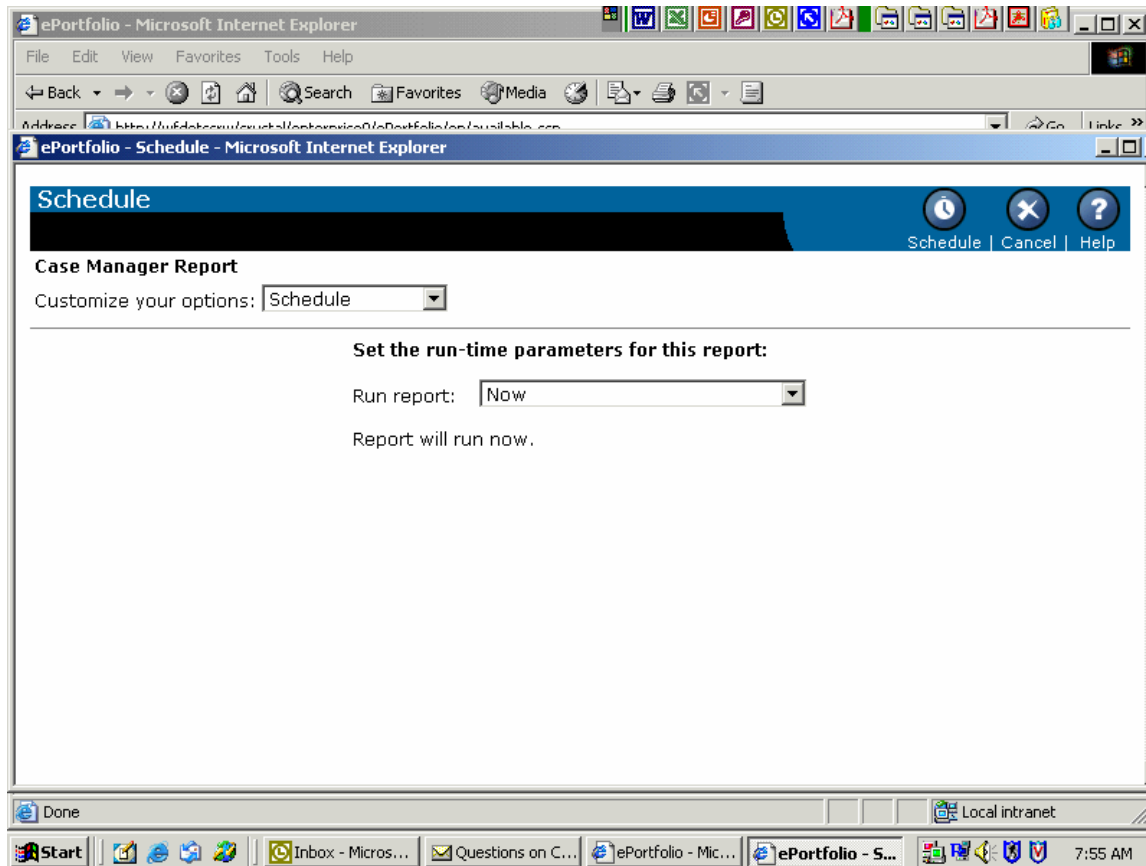
Delete Button – Only for administrators

Search Function - If you are unable to find a report or folder you can go to the search field, you can type in the search field part or the entire name of the report or folder and click on the search button. You will then get a list of the report/folder whose title matches your search criteria.

Type and Sort – You can use the sorting option to decide how you want the reports to be displayed in the eportfolio.

Help Function - Can be used to better understanding the functions and use of crystal. But there are a lot of options described in the Help Section that will not be using.

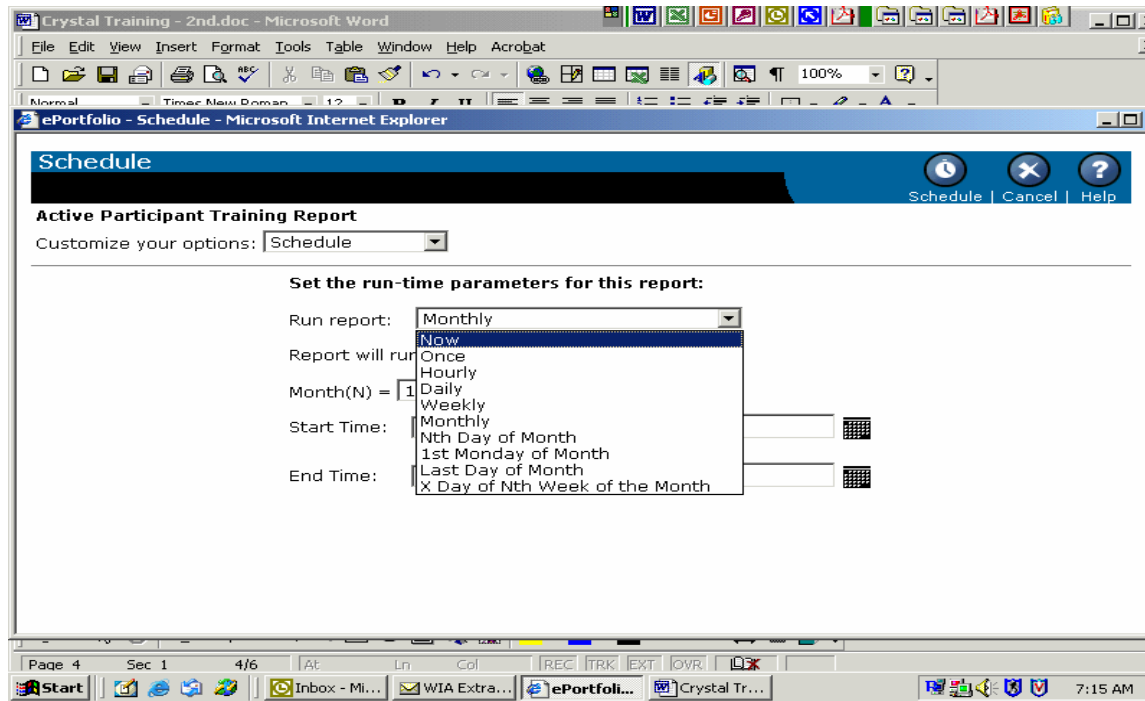
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Set the run-time parameters for this report - The users can set different execution times for all of the report by using this option. Currently this option is set to NOW for every report meaning when you click on the schedule button it will run immediately.

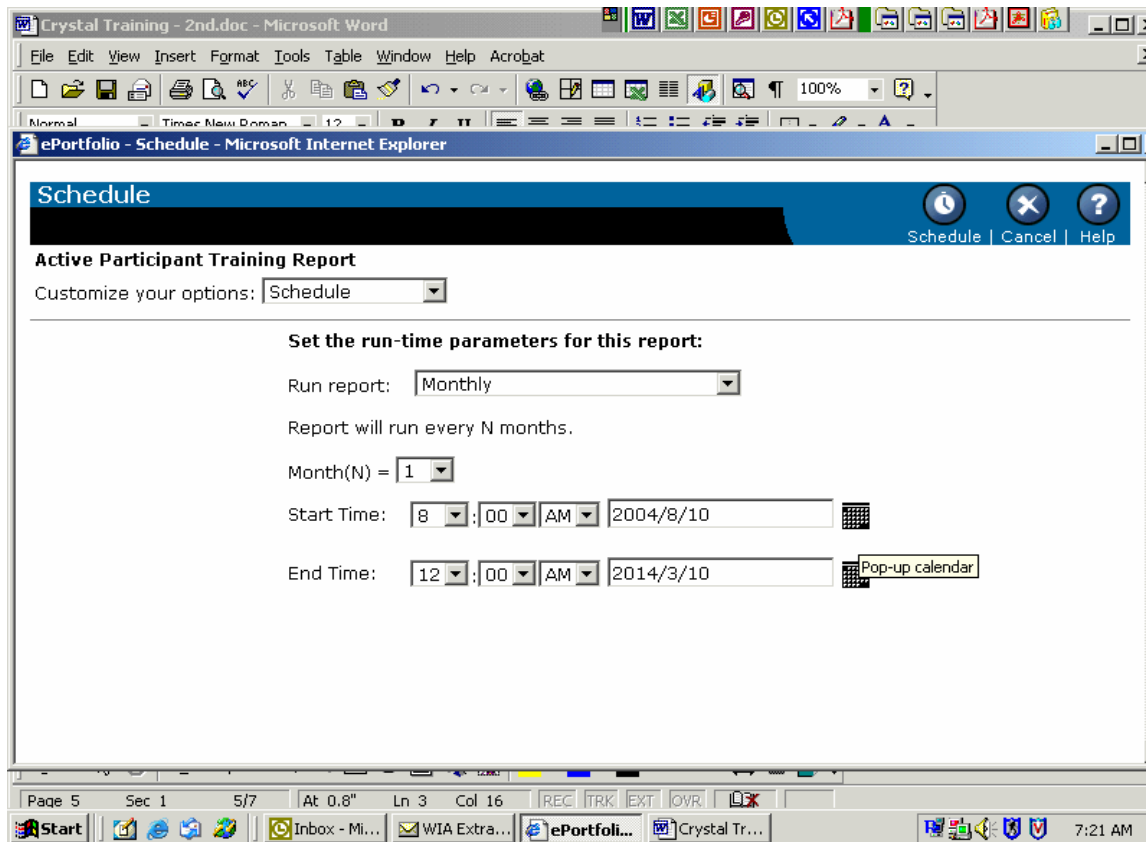
By clicking on the down arrow a drop down box will list the different options you have for running these reports. Click on the option you want and a new box will appear. Complete the information in these new boxes to set you option for running the report.

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Example to have a report run every month on the same date you would use the MONTHLY option.

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Month (N): Every month use 1; every other month use 2; Every Six month's use 6 and once a year use 12.

Start Time and End Time: Set the time you wish the report to start, end and the date.
When completed click on the Schedule Button.

Customize your options - The options that can be used are Schedule, Parameters, Format, and Print Settings.

Schedule - Can set the option of when they want to schedule the report.

Parameters - Where they set parameters for the report

Format - Where they can choose a different output format for the report. Example if they need the report to print excel or pdf format.

Print setting - Is the location for the report to print. (Programmers have to change)

These options are not available database logon, filters and destination.

Kentucky Workforce Investment Act Customer Data Reporting Manual

Crystal Training - 2nd.doc - Microsoft Word

File Edit View Insert Format Tools Table Window Help Acrobat

Normal Times New Roman 12 100%

ePortfolio - Schedule - Microsoft Internet Explorer

Schedule Schedule Cancel Help

Active Participant Training Report

Customize your options: Parameters

BEGIN_DATE: Enter Begin Date in format mm/dd/yyyy

New value: 01/01/2002 Add

Current value: No current value has been set.

☐ Set to null.

END_DATE: Enter End Date in format mm/dd/yyyy

New value: 10/01/2002 Add

Current value: No current value has been set.

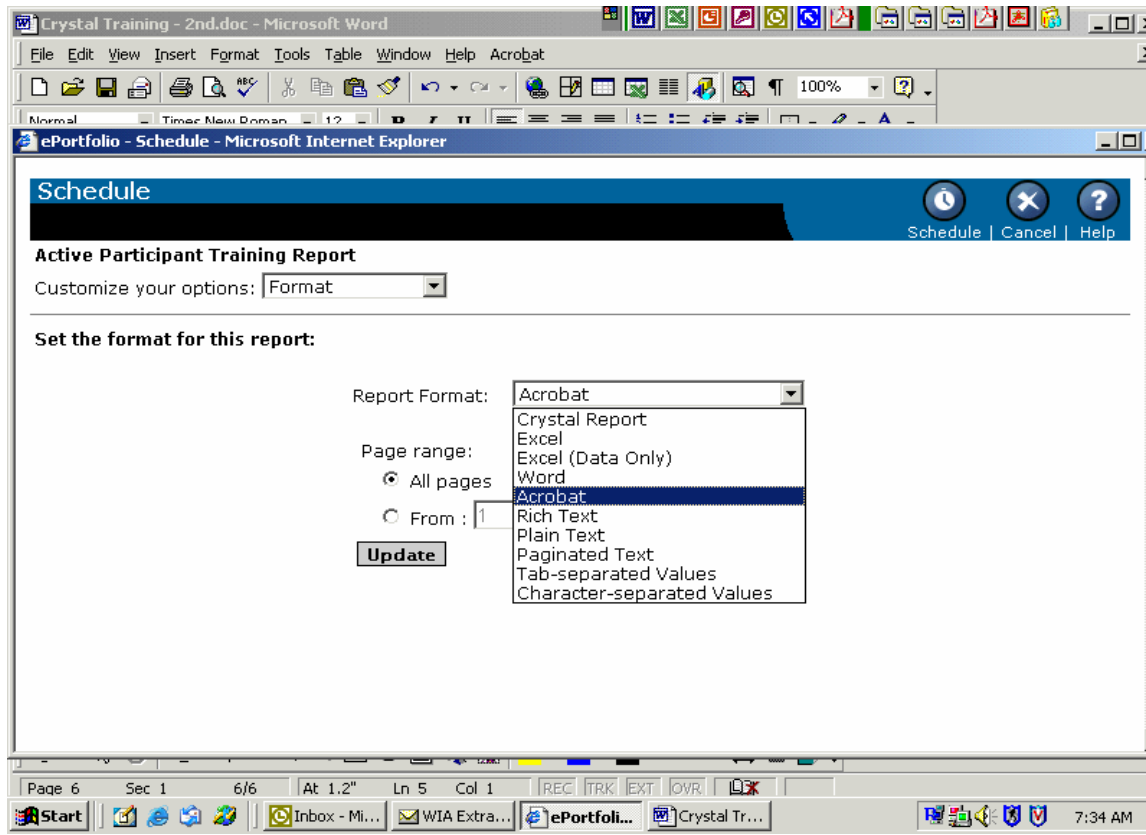
☐ Set to null.

Page 5 Sec 1 5/6 At Ln Col REC TRK EXT OVR

Start Inbox - Mi... WIA Extra... ePortfoli... Crystal Tr...

7:36 AM

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